

DEPARTMENT OF HEALTH SERVICES

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All County Medi-Cal Administrative Activities (MAA)/
Targeted Case Management (TCM) Coordinators and
Advisory Committee Members

TARGETED CASE MANAGEMENT ENCOUNTERS

The purpose of this transmittal is to restate and provide clarification to all local governmental agencies (LGA) on what is a valid billable Targeted Case Management (TCM) encounter.

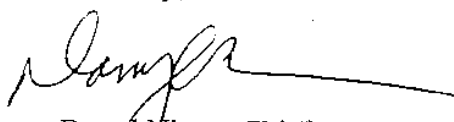
An encounter is defined as a "face-to-face" contact or a significant telephone contact in lieu of a "face-to-face" contact when environmental considerations preclude a "face-to-face" encounter, for the purpose of rendering one or more TCM service components by a case manager. An encounter for Public Guardian/Conservator Programs, is defined as a "face-to-face" encounter or significant telephone contact with or on behalf of the Medi-Cal eligible person for the purpose of rendering one or more TCM service components by a case manager.

→ A valid TCM encounter must include one or more TCM service components. The service components of TCM are a **documented assessment, development of a written comprehensive, individualized service plan, linkage and consultation, assistance with accessing the services, crisis assistance planning and periodic review**. Valid and billable TCM encounters must be appropriately documented in the client case file. The documentation must demonstrate that one or more TCM service components were provided on the service date.

In an effort to assist case managers in determining a valid and billable TCM encounter, different case management scenarios have been developed and are enclosed with this Policy and Procedure Letter.

If you have any questions regarding this matter, please contact the Administrative Claiming Unit analyst assigned to your LGA.

Sincerely,



Darryl Nixon, Chief
Medi-Cal Benefits Branch

Enclosure

cc: See next page

TARGETED CASE MANAGEMENT ENCOUNTER GUIDE

| | Case scenarios that may or may not be a valid billable TCM encounter | YES | NO |
|----|---|-----|----|
| | | | |
| 1 | A TCM case manager does an assessment and referral for treatment for a TCM client during a face-to-face visit. | X | |
| 2 | A TCM client reports to the clinic to receive an actual provision of a medical service and/or treatment. | | X |
| 3 | Outreach activities which attempt to contact potential recipients of a TCM service. | | X |
| 4 | A TCM case manager performs discharge planning in a hospital setting. | | X |
| 5 | During a face-to-face TCM encounter an assessment is done and the TCM case manager determines that the TCM client requires no further assistance at this time. | X | |
| 6 | TCM encounters to individuals who are inmates of Public Institutions, such as jails or who are inpatients of an Institutions for Mental Disease for more then 24 hours. | | X |
| 7 | A TCM case manager discusses/reviews a service plan with a TCM client present, who then disagrees with the plan and chooses not to accept the referrals or continued case management. | X | |
| 8 | The TCM case managers' time spent writing a service plan when the TCM client is not present. | | X |
| 9 | A translator, or other paraprofessional, accompanies a TCM case manager on a home visit to provide a TCM service component and the TCM case manager counts and bills for only one encounter. | X | |
| 10 | A TCM case manager arranges service for a TCM client during a face-to-face contact. | X | |
| 11 | During a face-to-face contact a TCM case manager assesses and discusses plans with the mother of an TCM infant however, the infant is not at home. | X | |
| 12 | Directly Observed Therapy is given to a Medi-Cal client. | | X |
| 13 | A family unit is being case managed and each family member is a TCM client. The TCM case manager during a face-to-face contact provides a TCM service to each family member during one home visit. The TCM case manager counts and bills for each family member who received a service. | X | |

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|----|--|---|---|
| 14 | A TCM case manager conducts a face-to-face encounter with a TCM client to provide a TCM service component. The TCM client has had an assessment and/or service plan done previously by another TCM case manager and the new TCM case manager does not do another assessment and/or service plan. | X | |
| 15 | In a public health program a TCM encounter occurred and a TCM service was provided to a Medi-Cal client who was eligible for a limited range of services in an emergency situation such as emergency services, pregnancy related services, or sensitive services to teens. | X | |
| 16 | Crisis assistance planning that is immediate in and non-medical in nature is provided to a TCM client by a TCM case manager in an outpatient clinic. | X | |
| 17 | Crisis assistance planning that is immediate and medical in nature is provided to a TCM client by a TCM case manager in an outpatient clinic. | | X |
| 18 | A client was seen at a primary care clinic for a visit and was told they have a urinary infection. The nurse made a telephone call to be sure the client was taking the antibiotics and was following instructions. | | X |
| 19 | A TCM Medi-Cal client needed housing and received notice of eviction and needed a source of income until he could return to work. The public health nurse developed a plan with the client for housing during a face-to-face office visit. | X | |
| 20 | A teen mom and baby were referred to a case manager by a local pediatrician as the infant continued to have recurrent ear infections. The nurse made a home visit to assess for reasons for recurrent infections. She discovered the teen mom was not in school and the baby was bottle fed with propped bottle. They were both on Medi-Cal. | X | |
| 21 | A call came into the nurse on duty and the caller asked for resources for their respiratory problem. The nurse advised the caller of their clinic and the hours, location, etc. | | X |
| 22 | A TCM case manager during a face-to-face encounter with a TCM client observes domestic violence and then counsels the client and refers the client to a shelter. | X | |
| 23 | A nurse conducts a follow-up visit with a tuberculosis TCM client that <u>only</u> addresses tuberculosis related treatment. | | X |
| 24 | The public guardian TCM case manager provides a referral and conducts a significant telephone contact with a family member acting on behalf of the Medi-Cal eligible client and documents the specific information in the case file as to why a face-to-face was not conducted. | X | |